

CUSTOMER EXPENSES POLICY

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Lead officer:	Tanya King

Customer Expenses Policy

1 INTRODUCTION

The purpose of the Customer Expenses Policy is to encourage participation and to ensure that any customer who commits time to getting involved is not left out of pocket and reimbursed in a timely way.

2 STRATEGIC LINKS

The policy links to Stockport Homes Group's (SHG) Customer Voice and Influence Strategy 2020-2023

3 KEY FEATURES OF THE POLICY

3.1 Declaration of Income

Individual customers (not Stockport Homes) are responsible for the notification of eligible income in tax and welfare benefits calculations. Customers are encouraged to seek specialist advice on their individual circumstances from HM Revenue & Customs (HMRC).

3.2 Claiming Expenses

Expenses claim forms are available from the Customer Engagement and Inclusion Team or via the SHG website. Completed claim forms must be submitted to the Customer Engagement and Inclusion Team with receipts for expenditure attached within two months of the date of expenditure. Payment will be made directly into the customer's bank account by BAC's on provision of their account details.

3.3 Travel Expenses

Customers are entitled to reclaim any expenses incurred by travelling to and from SHG approved activities, meetings and events. Customers will be required to provide a receipt or ticket as proof of the expenses incurred. In order to qualify for reimbursement, claims should be submitted within two months of the date of expenditure.

The most economical form of public transport should be used. For longer journeys, such as travel to a conference, the Customer Engagement and Inclusion Team will arrange and book travel requirements in advance. In other circumstances, customers will normally be expected to pay their own fares and reclaim the cost by submitting a claim using the form and with tickets and receipts attached. 2nd class train fares and reasonable bus fares will be reimbursed.

Where appropriate, alternatives to physical presence will be explored in order to support those unable to travel to participate, particularly during the periods of Covid-19 restrictions. This could include, for example, joining via virtual methods such as MS Teams or Zoom etc. or via the telephone. Options to support this will be discussed and agreed with customers in advance.

3.4 Claiming Mileage

Customers can claim mileage for travel to and from approved events in their own vehicle. Mileage rates are in line with the approved rates set by HMRC and are reimbursed per mile as:

- Car and vans: £0.45p
- Motorcycles: £0.24p
- Bicycles: £0.20p

Any parking, road traffic fines or penalties incurred by a customer while carrying out their duties will not be reimbursed by Stockport Homes.

3.5 Travel by Taxi

Special consideration for travel by taxi will be made for customers concerning risks associated with Covid-19, or with mobility requirements. More generally, the use of taxis will be allowed for evening meetings or where the venue is of such location that it would be inefficient to use public transport. In respect of all use of taxis, arrangements must be made with the Customer Engagement and Inclusion Team with a minimum of 24 hours' notice prior to requirements. Taxi's will be booked via a contract with a local firm, therefore no physical money will be exchanged.

3.6 Carers Allowance

Children

An allowance shall be payable for childcare at a rate equivalent to the current value of the national minimum wage. A payment will not be payable in respect of care provided by a member of the claimant's immediate family comprising members of the same household, grandparents, uncle and aunts. As a public organisation, Stockport Homes has a duty to safeguard children and young people from harm. As such only registered childminders should be used whenever possible.

The timing and costs of formal childcare provision should be agreed with the Customer Engagement and Inclusion Team prior to the activity or event. In all cases, the childminder should send an invoice to the Customer Engagement and Inclusion Team directly for payment.

Other dependents/adults

For the care of other dependents a reasonable allowance will be paid. Care costs must be agreed in advance with the Customer Engagement and Inclusion Team. Payment will only be made to non-household or non-family members only. Customers eligible for this will normally be in receipt of the Carer's Allowance to look after someone.

3.7 Subsistence Allowance

Subsistence allowance for meals can only be claimed if no meal is provided whilst attending approved business. The subsistence rates have been set as follows and they are in-line with the levels set for Stockport Homes staff:

- Breakfast: £4.60 (after an event requiring an over-night stay if not provided)
- Lunch: £6.33 (events inclusive of hours between 12 noon and 2 pm)
- Tea: £2.49 (events between 3pm to 7pm)
- Evening Meal: £7.84 (events ending after 7pm)

Claims must be made using the standard claim form with receipts attached. These allowances include claims for tea, coffee or other soft drinks but not alcoholic drinks. Costs associated with room service will not be reimbursed.

3.8 IT and Internet Connection

Where reasonable and appropriate, SHG will endeavour to loan or provide access to computer equipment to customers to enable them to engage in an involvement activity where there are no alternative options. This would only apply in circumstances where customers commit to an activity that would require sustained engagement over a period of time, for example, the Customer Scrutiny Panel. In these circumstances costs for broadband may be partially reimbursed on production of a current bill and by prior arrangement with the Customer Engagement and Inclusion or Governance Teams.

4 TRANSPARENCY AND ACCOUNTABILITY

Stockport Homes will use public funds to pay for the day-to-day running costs of its business. It is therefore critical to uphold the highest standard of transparency and accountability in all our practices, including payments for customer expenses. For this purpose, all expense claims must be supported by sufficient documentation and receipts and invoices will be kept for audit purposes for a period of six years.

5 OWNERSHIP, MONITORING & REVIEW

The expenses policy will be reviewed annually, with the Assistant Chief Executive approving any changes.